

DD Consumer Referrals

Contract Provider Training

Last Updated: January, 2012
Prepared by: Cathy Solomon

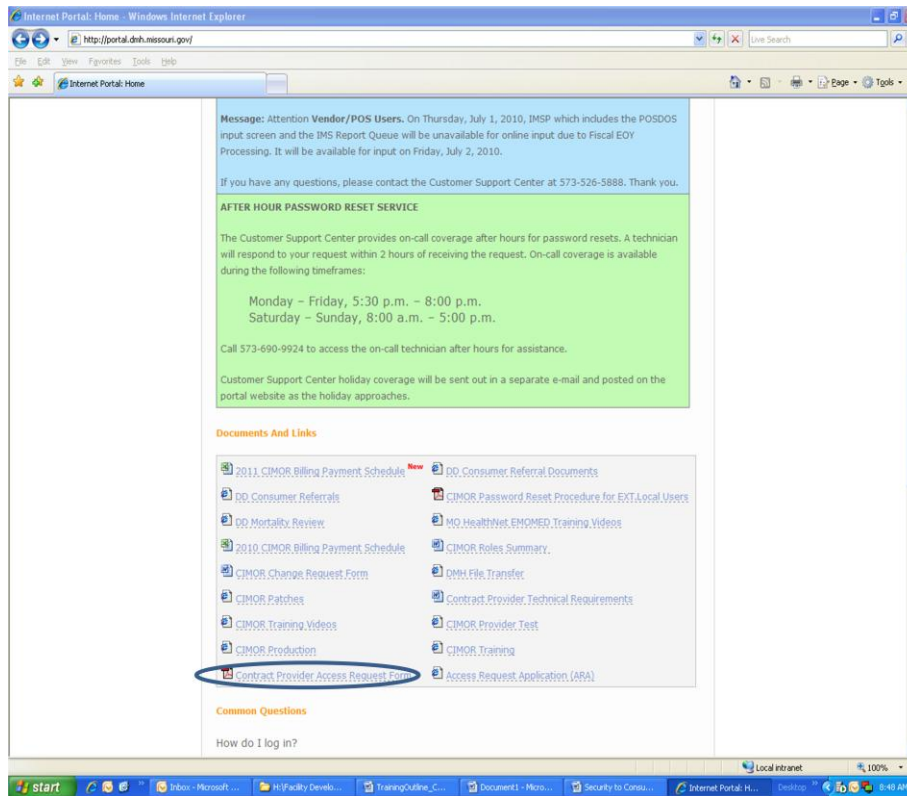
Contents

Security Clearance.....	2
DD Consumer Referral Getting Started.....	4
Provider Profile	4
Notifications.....	7
Search for a Referral	8
View a Referral.....	9
Responding to a Referral.....	10
Obtaining Help	10

Security Clearance

The first important step to use the DD Consumer Referral system is to obtain a User ID and password with the Department of Mental Health. You will sign on with this User ID and password any time you wish to view a referral. Here are the instructions to obtain security clearance:

1. Go to the DMH portal: <https://portal.dmh.missouri.gov>.
2. When you scroll to the middle of the screen, find the link 'Contract Provider Access Request Form':



3. Print the document: 'Contract Provider Access Request Form'.
4. Fill out page 1.

5. On page 2, write your name at the top and check the 'Add' box under Part 5, Consumer Referrals. Page 2 will look like this:

Department of Mental Health			
Contract Provider Access Request Form			
Updated: 5/14/2010			
Name Your Name Here			
PART 3: Production Systems Information			
Check all system accesses required and indicate whether access should be Added or Removed.			
Add	Remove	System Name	Purpose
		POS - Purchase of Service	Payments
		CIMOR – Consumer Information Management, Outcomes & Reporting Training	
PART 4: Mortality Review – available to DD Providers only			
This system is currently in the pilot phase.			
Add	Remove	Role	Description
		Provider Access	This role, scoped to Application Level (Access Users Own Records Only), includes View/Write access to the following sections: Provider Part 1 & 2
Part 5: Consumer Referrals – available to DD Providers only			
Add	Remove	Role	Description
X		Provider Access	The Provider role allows a provider agency to receive and view referrals as well as maintain their 'Provider Profile', including e-mail addresses and the link to a county served. Scoped by Provider Agency.
ADDITIONAL DATA REQUEST:			

6. Obtain your supervisor's signature on page 1.
7. Be sure that the Local HIPAA Security Officer for your organization signs Page 1.
8. Please retain a copy of this form for your records.
9. You may scan, fax, or mail these documents. The security form will instruct you on where to send your document.

DD Consumer Referral Getting Started

Once you have obtained a User ID and password, you may then enter the system. The Consumer Referral system may be found on the portal page: <https://portal.dmh.missouri.gov>. From there, navigate to: 'DD Consumer Referrals'.

Provider Manual: You are already viewing the provider manual. It is located in two places: Look for 'DD Consumer Referrals Documents' and then find the 'DD Consumer Referral Provider Manual.pdf'. It is also located as a 'Help' link in the system itself.

Provider Profile

In order to receive referrals from the system, **DMH must have a valid e-mail address for you on file**. Verifying your Provider Profile is the first step after you have received your user ID and password.

From the home page of DD Consumer Referrals, press the [Provider Profile](#) hyperlink:

DEPARTMENT OF MENTAL HEALTH - DD CONSUMER REFERRAL SYSTEM

Welcome Cathy Solomon [Log Off](#)

[Provider Profile](#)

Facility

Bethesda Lutheran Communities, Inc -Kirkwood Group Home

DMH ID

Referral #

Last Name

First Name

☐ Open & Closed

☒ Open

☐ Closed

Search

Clear

Facility Mode

	Referral Number	Status	Facility Code	Consumer Full Name	DMH ID	Birth Date	Gender	Open Admission	Site/Unit	Ward
View	99	Open	012			7/18/1937	Female	Y		
View	98	Open	014			8/18/1989	Male	Y		
View	133	Open	015			5/1/1963	Female	Y		
View	132	Open	015			11/5/1964	Male	Y		
View	100	Open	019			1/28/1989	Male	Y		
View	95	Open	023			10/11/1984	Female	Y		
View	94	Open	023			2/18/1986	Male	Y		
View	96	Open	029			4/12/1969	Male	Y		

This screen will appear.

DEPARTMENT OF MENTAL HEALTH - DD CONSUMER REFERRAL SYSTEM

Welcome Cathy Solomon [Log Off](#)

[HOME](#)

Edit Provider Information

Bethesda Lutheran Communities, Inc -Kirkwood Group Home

	LastName	FirstName	UserID	Phone	Extension	Email	Inactive
Edit	Solomon1	Cathy		314-244-9476		CathySolomon1@charter.net	<input type="checkbox"/>

[Add New Contact](#)

If you are not in the list, you may add yourself as a new contact by pressing [Add New Contact](#). If you are already in the list, then it is important for you to press the [Edit](#) hyperlink to verify your information.

In 'Edit' mode, the screen looks like this:

DEPARTMENT OF MENTAL HEALTH - DD CONSUMER REFERRAL SYSTEM

[HOME](#)

Edit Contact Info

Facility	Bethesda Lutheran Communities, Inc -Kirkwood Group Home
First Name	<input type="text" value="Cathy"/>
Last Name	<input type="text" value="Solomon1"/>
Phone	<input type="text" value="314-244-9476"/>
Phone Ext	<input type="text"/>
Email	<input type="text" value="CathySolomon1@char"/>
Inactive	<input type="checkbox"/>
User ID	<input type="text" value="MHSOLOC"/>

[Save](#) [Cancel](#)

County(s) Served

ADAIR
CLARK
GRUNDY
JEFFERSON
KNOX
LINN
LIVINGSTON
MACON
MERCER
PUTNAM
SCHUYLER
SCOTLAND
SHELBY
ST LOUIS COUNTY

[Add/Remove Counties](#)

Simply type in the Contact information. **Be sure your e-mail address is typed accurately.** And, please add your User ID that you were granted from DMH (although not required, we appreciate it). When done, press [Save](#).

You must also [Add/Remove Counties](#) associated with this contact. **Please do not select ALL counties. Instead, select the counties where you have an ISL or Group Home located.** Please keep in mind that there are two types of referrals: a) Statewide – if a family has no county preference and is willing to move anywhere, you will receive the referral regardless of the counties you have selected. b) County – if the family has a preference of one or more counties, then the system will only send the referral to providers who serve that county.

If a contracted provider has 3 employees, let's say, and each one covers 2 counties (6 unique counties for that provider), the Provider Profiles may be setup in one of two ways:

1. Each employee can cover all 6 counties. Each employee will then receive notifications for all 6 counties PLUS all statewide type referrals.
2. Each employee can cover only their 2 counties, limiting their notifications to their 2 associated counties PLUS all statewide type referrals.

So, it is an urgent matter that you select the counties in which you have an ISL or Group Home; but remember, do NOT select ALL counties in this list.

When you press [Add/Remove Counties](#) , this screen will appear:

DEPARTMENT OF MENTAL HEALTH - DD CONSUMER REFERRAL SYSTEM

Welcome Cathy Solomon [Log Off](#)

[HOME](#)

Maintain Counties- Bethesda Lutheran Communities, Inc -Kirkwood Group Home

Staff: Cathy Solomon1

<input checked="" type="checkbox"/> ADAIR	<input type="checkbox"/> ANDREW	<input type="checkbox"/> ATCHISON	<input type="checkbox"/> AUDRAIN	<input type="checkbox"/> BARRY	<input type="checkbox"/> BARTON
<input type="checkbox"/> BATES	<input type="checkbox"/> BENTON	<input type="checkbox"/> BOLLINGER	<input type="checkbox"/> BOONE	<input type="checkbox"/> BUCHANAN	<input type="checkbox"/> BUTLER
<input type="checkbox"/> CALDWELL	<input type="checkbox"/> CALLAWAY	<input type="checkbox"/> CAMDEN	<input type="checkbox"/> CAPE GIRARDEAU	<input type="checkbox"/> CARROLL	<input type="checkbox"/> CARTER
<input type="checkbox"/> CASS	<input type="checkbox"/> CEDAR	<input type="checkbox"/> CHARITON	<input type="checkbox"/> CHRISTIAN	<input checked="" type="checkbox"/> CLARK	<input type="checkbox"/> CLAY
<input type="checkbox"/> CLINTON	<input type="checkbox"/> COLE	<input type="checkbox"/> COOPER	<input type="checkbox"/> CRAWFORD	<input type="checkbox"/> DADE	<input type="checkbox"/> DALLAS
<input type="checkbox"/> DAVIESS	<input type="checkbox"/> DEKALB	<input type="checkbox"/> DENT	<input type="checkbox"/> DOUGLAS	<input type="checkbox"/> DUNKLIN	<input type="checkbox"/> FRANKLIN
<input type="checkbox"/> GASCONADE	<input type="checkbox"/> GENTRY	<input type="checkbox"/> GREENE	<input checked="" type="checkbox"/> GRUNDY	<input type="checkbox"/> HARRISON	<input type="checkbox"/> HENRY
<input type="checkbox"/> HICKORY	<input type="checkbox"/> HOLT	<input type="checkbox"/> HOWARD	<input type="checkbox"/> HOWELL	<input type="checkbox"/> IRON	<input type="checkbox"/> JACKSON
<input type="checkbox"/> JASPER	<input checked="" type="checkbox"/> JEFFERSON	<input type="checkbox"/> JOHNSON	<input checked="" type="checkbox"/> KNOX	<input type="checkbox"/> LACLEDE	<input type="checkbox"/> LAFAYETTE
<input type="checkbox"/> LAWRENCE	<input type="checkbox"/> LEWIS	<input type="checkbox"/> LINCOLN	<input checked="" type="checkbox"/> LINN	<input checked="" type="checkbox"/> LIVINGSTON	<input checked="" type="checkbox"/> MACON
<input type="checkbox"/> MADISON	<input type="checkbox"/> MARIES	<input type="checkbox"/> MARION	<input type="checkbox"/> MCDONALD	<input checked="" type="checkbox"/> MERCER	<input type="checkbox"/> MILLER
<input type="checkbox"/> MISSISSIPPI	<input type="checkbox"/> MONITEAU	<input type="checkbox"/> MONROE	<input type="checkbox"/> MONTGOMERY	<input type="checkbox"/> MORGAN	<input type="checkbox"/> NEW MADRID
<input type="checkbox"/> NEWTON	<input type="checkbox"/> NODAWAY	<input type="checkbox"/> OREGON	<input type="checkbox"/> OSAGE	<input type="checkbox"/> OZARK	<input type="checkbox"/> PEMISCOT
<input type="checkbox"/> PERRY	<input type="checkbox"/> PETTIS	<input type="checkbox"/> PHELPS	<input type="checkbox"/> PIKE	<input type="checkbox"/> PLATTE	<input type="checkbox"/> POLK
<input type="checkbox"/> PULASKI	<input checked="" type="checkbox"/> PUTNAM	<input type="checkbox"/> RALLS	<input type="checkbox"/> RANDOLPH	<input type="checkbox"/> RAY	<input type="checkbox"/> REYNOLDS
<input type="checkbox"/> RIPLEY	<input type="checkbox"/> SALINE	<input checked="" type="checkbox"/> SCHUYLER	<input checked="" type="checkbox"/> SCOTLAND	<input type="checkbox"/> SCOTT	<input type="checkbox"/> SHANNON
<input checked="" type="checkbox"/> SHELBY	<input type="checkbox"/> ST CHARLES	<input type="checkbox"/> ST CLAIR	<input type="checkbox"/> ST FRANCOIS	<input type="checkbox"/> ST LOUIS CITY	<input checked="" type="checkbox"/> ST LOUIS COUNTY
<input type="checkbox"/> STE GENEVIEVE	<input type="checkbox"/> STODDARD	<input type="checkbox"/> STONE	<input type="checkbox"/> SULLIVAN	<input type="checkbox"/> TANEY	<input type="checkbox"/> TEXAS
<input type="checkbox"/> VERNON	<input type="checkbox"/> WARREN	<input type="checkbox"/> WASHINGTON	<input type="checkbox"/> WAYNE	<input type="checkbox"/> WEBSTER	<input type="checkbox"/> WORTH
<input type="checkbox"/> WRIGHT					

[Save](#) [Cancel](#)

Simply check or uncheck the counties. Press the [Save](#) hyperlink when done.

Notifications

Residential Providers receive notifications when a referral is published, re-published, deleted, or closed.

Please keep in mind that there are two types of referrals:

- a) **Statewide** – if a family has no county preference and is willing to move anywhere, you will receive the referral regardless of the counties selected in the Provider Profile.
- b) **County** – if the family has a preference of one or more counties, then the system will only send the referral to providers who serve that county based on the counties selected in the Provider Profile.

There are 3 exceptions to these statements.

1. When a provider is placed in 'No Referral Status', referrals are suspended until the status is lifted.
2. The provider must not have been excluded due to family preference.
3. If the provider has no active contacts, notifications are not possible.

Reminders are sent out every 30 days to providers until the referral is closed or deleted. There is one reminder e-mail sent with a listing of the referrals rather than one e-mail per referral. This saves us from bombarding providers with reminders.

When the provider comes off of 'No Referral Status', eligible referrals are displayed on their screen immediately and they receive an immediate e-mail notifications for all referrals to which they were suspended.

If a provider is included on a referral after having previously been excluded, they will receive a notification at the point the referral is published again after this change is made.

New providers are automatically added to the appropriate county and statewide referrals. They are also notified of the referrals at that point.

Coordinators receive notifications when a referral is published, re-published, deleted, or closed. County-Based Referrals generate notifications to both Placement and Transition Coordinators of the counties selected in the referral. Statewide Referrals generate notifications to all coordinators.

When a provider responds, the primary coordinator receives notification of the response.

Search for a Referral

There are several ways to search for a referral. The default view is all open referrals for your organization. Searching by any combination of Last Name, First Name, DMH ID, Referral Number, and the status (open and/or closed) is possible. Simply fill in the filters on the screen and press 'Search'.

[Provider Profile](#)

Facility: Bethesda Lutheran Communities, Inc -Kirkwood Group Home

DMH ID:

Referral #:

Last Name:

First Name:

☐ Open & Closed

☒ Open

☐ Closed

[Search](#)

[Clear](#)

[Facility Mode](#)

A grid with the referrals will appear:

DEPARTMENT OF MENTAL HEALTH - DD CONSUMER REFERRAL SYSTEM Welcome Cathy Solomon [Log Off](#)

[Provider Profile](#) [Help](#)

Facility: Bethesda Lutheran Commu... DMH ID: Referral #:

Last Name: First Name:

☐ Open & Closed

☒ Open

☐ Closed

[Search](#)

[Clear](#)

[Facility Mode](#)

	Referral Number	Status	Facility Code	Consumer Full Name	DMH ID	Birth Date	Gender	Pending Placement	Referral Age	Response
View	165	Open	012				Male	Yes	348	Accept
View	178	Open	023				Male	Yes	0	Accept

Basic information about the referral is displayed:

- Referral Number: A unique identifier for the referral.
- Status: The referral may be 'Open', meaning that DMH is still trying to place the consumer. The referral may be 'Closed', meaning placement is finished.
- Facility Code: 3-digit code representing the facility that originated the referral.
- Consumer Full Name
- DMH ID
- Birth Date
- Gender
- Pending Placement: A provider has been chosen in the process but the referral is not yet closed in case something does not work out. This serves as a notification to the providers who were interested that placement is pending but not yet completely finalized.
- Referral Age: Calculation of how many days the referral has been active.
- Response: Allows the provider to see their own response to the referral at a glance. This is useful so that providers do not view the same referrals over and over.

Notice that the default sort order on the page is the oldest referral to the youngest. Any referral older than 60 days will be red. The user may sort by any column by pressing on that column heading.

View a Referral

To view a referral, simply click 'View' on the home page next to the referral you wish to see:

DEPARTMENT OF MENTAL HEALTH - DD CONSUMER REFERRAL SYSTEM Welcome Cathy Solomon [Log Off](#)

[Provider Profile](#) [Help](#)

Facility: DMH ID: Referral #: ☐ Open & Closed
Last Name: First Name: ☒ Open
☐ Closed

	Referral Number	Status	Facility Code	Consumer Full Name	DMH ID	Birth Date	Gender	Pending Placement	Referral Age	Response
View	165	Open	012	[REDACTED]			Male	Yes	348	Accept
View	178	Open	023	[REDACTED]			Male	Yes	0	Accept

This screen will appear displaying:

- the State Facility from which the referral is originating;
- the primary Coordinator in DMH with e-mail and phone;
- the consumer's basic demographic information including address, age, gender, guardian(s);
- the counties preferred by the consumer; and
- attachments (Consumer Profile, Person Centered Plan (PCP), Behavior Support Plan (BSP), Last Nursing Review/HIPS).

Press the 'Open' hyperlink to view the attachments.

DEPARTMENT OF MENTAL HEALTH - DD CONSUMER REFERRAL SYSTEM Welcome Cathy Solomon [Log Off](#)

[HOME](#)

Referral # 133

State Facility <input type="text" value="Joplin Regional Office"/>	Coordinator <input type="text" value="Stephen Carroll - Placement"/>	Last Notification <input type="text" value="6/14/2010"/>	Publish Date <input type="text" value="6/14/2010"/>	Close Date <input type="text"/>
DMH ID: <input type="text"/>	Consumer Name: <input type="text"/>	Address: <input type="text"/>	City, State, Zip: <input type="text" value="El Dorado Spring MO 64744"/>	
Gender: <input type="text" value="Female"/>	DOB: <input type="text"/>	Age: <input type="text" value="47"/>	Guardian: <input type="text"/>	

Counties		Coordinators		Attachment(s)		
Preference	County	Name	Email	Phone		Document
1	JASPER	Stephen Carroll	Stephen.Carroll@dmh.mo.gov	417-629-3533	Open	Fake document.pdf
	ADAIR					
	ANDREW					
	ATCHISON					
	AUDRAIN					
	BARRY					
	BARTON					
	BATES					
	BENTON					
	BOLLINGER					
Available Counties: 115						

Provider Response

Response: Provision/Reason:

Comments:

Contact:

Responding to a Referral

Responding to a referral is important for 3 reasons:

1. The division wants to understand why providers may not want to consider a referral to help track and respond to trends.
2. It will help the Division to identify areas of the state for provider development.
3. It is also important to make sure providers are receiving the referrals and using the system.

A provider may accept or decline placement. The provider may tentatively accept by putting a 'provision' in the provision drop down. To further clarify any response, comments may be added. Simply fill in the response portion of the screen and press save. At any point, a provider may edit their response. The Primary Coordinator will receive notification of the response.

DEPARTMENT OF MENTAL HEALTH - DD CONSUMER REFERRAL SYSTEM

Welcome Cathy Solomon [Log Off](#)

[HOME](#)

Referral # 99

State Facility	Coordinator	Last Notification	Publish Date	Close Date
Kirkville Regional Office	Sean Murphy - Placement	6/7/2010	6/7/2010	

DMH ID:	Consumer Name:	Address:	City, State, Zip:
			Kirkville MO 63501
Gender: Female	DOB:	Age: 72	Guardian:

Counties	Coordinators	Attachment(s)																															
<table><thead><tr><th>Preference</th><th>County</th></tr></thead><tbody><tr><td></td><td>ADAIR</td></tr><tr><td></td><td>ANDREW</td></tr><tr><td></td><td>ATCHISON</td></tr><tr><td></td><td>AUDRAIN</td></tr><tr><td></td><td>BARRY</td></tr><tr><td></td><td>BARTON</td></tr><tr><td></td><td>BATES</td></tr><tr><td></td><td>BENTON</td></tr><tr><td></td><td>BOLLINGER</td></tr><tr><td></td><td>BOONE</td></tr></tbody></table>	Preference	County		ADAIR		ANDREW		ATCHISON		AUDRAIN		BARRY		BARTON		BATES		BENTON		BOLLINGER		BOONE	<table><thead><tr><th>Name</th><th>Email</th><th>Phone</th></tr></thead><tbody><tr><td>Sean Murphy</td><td>Sean.Murphy@dmh.mo.gov</td><td>660-785-2500</td></tr></tbody></table>	Name	Email	Phone	Sean Murphy	Sean.Murphy@dmh.mo.gov	660-785-2500	<table><thead><tr><th>Document</th></tr></thead><tbody><tr><td>Open Fake PSD for</td></tr><tr><td>Open Fake pcp.pdf</td></tr></tbody></table>	Document	Open Fake PSD for	Open Fake pcp.pdf
Preference	County																																
	ADAIR																																
	ANDREW																																
	ATCHISON																																
	AUDRAIN																																
	BARRY																																
	BARTON																																
	BATES																																
	BENTON																																
	BOLLINGER																																
	BOONE																																
Name	Email	Phone																															
Sean Murphy	Sean.Murphy@dmh.mo.gov	660-785-2500																															
Document																																	
Open Fake PSD for																																	
Open Fake pcp.pdf																																	

Provider Response

Response:

Accept

Provision:

Day activities

Comments:

Put comments here.

Contact:

Cathy Solomon1

Save

Available Counties: 115

Obtaining Help

The Provider Relations contact at the nearest Regional Office is the primary contact for any help related with this system.

The Primary Coordinator displayed in the referral is the primary contact for working out placement issues.

The ITSD help desk at the nearest Regional Office is the primary contact for technical difficulties, such as security clearance or system downtime.